42500-3
9/2/88

# NEWSPRINT DIVISION

AMERICAN PAPER INSTITUTE
260 Madison Ave., New York, N.Y. 10016

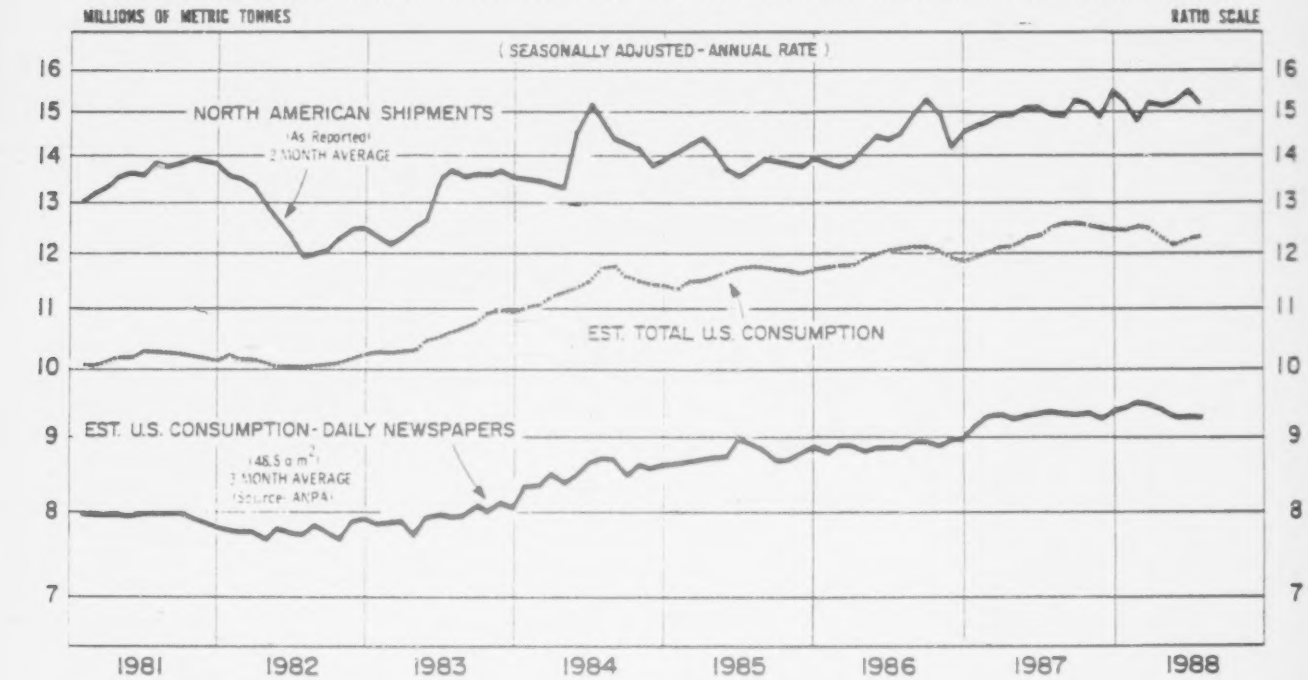
MONTHLY STATISTICAL REPORT**
(In Metric Tons)

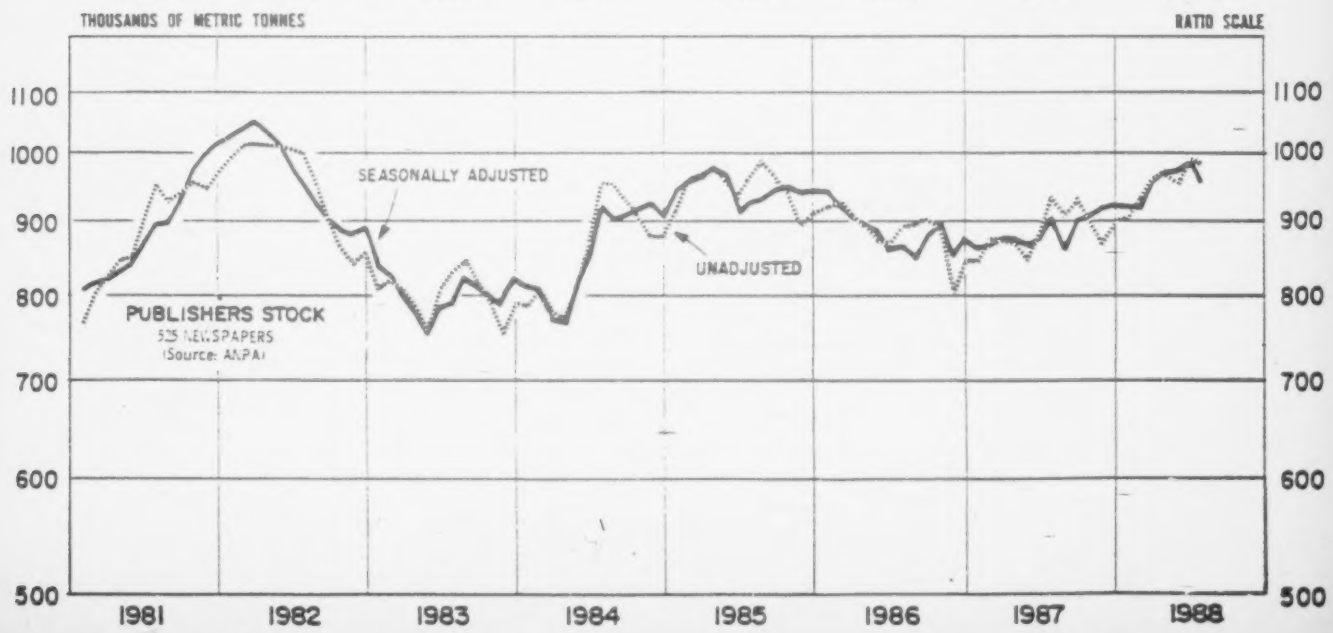
REPORT FOR JULY, 1988

## U.S. CONSUMPTION

| | % CHANGE 1988 vs. 1987 | | |
|---|---|---|---|
| | 1Q | 2Q | JULY |
| TOTAL | +4.6 | -0.9 | +1.7 |
| DAILY NEWSPAPERS | +3.2 | -0.7 | +2.3 |
| OTHER USES | +9.1 | -1.7 | -0.4 |

## TOTAL UNITED STATES NEWSPRINT CONSUMPTION & TOTAL NEWSPRINT SHIPMENTS FROM NORTH AMERICA




230-07

ISSUED: 8/26/88

| THOUSANDS OF METRIC TONNES | JULY 1987 | JULY 1988 | JULY % Change | 7 Mos. Year-to-Date 1987 | 7 Mos. Year-to-Date 1988 | 7 Mos. Year-to-Date % Change | On Page No* |
|---|---|---|---|---|---|---|---|
| PRODUCTION AND SHIPMENTS | | | | | | | |
| NORTH AMERICA | | | | | | | |
| Production | 1,246 | 1,263 | + 1.3 | 8,677 | 8,969 | + 3.4 | 3 |
| % of Capacity | 94.8 | 95.6 | | 96.8 | 98.5 | | 7 |
| Shipments | 1,231 | 1,225 | - 0.5 | 8,675 | 8,787 | + 1.3 | 3 |
| UNITED STATES | | | | | | | |
| Production | 455 | 436 | - 4.2 | 3,048 | 3,147 | + 3.2 | 4 |
| % of Capacity | 100.0 | 94.9 | | 96.1 | 97.8 | | 7 |
| Shipments | 452 | 431 | - 4.7 | 3,055 | 3,119 | + 2.1 | 4 |
| CANADA | | | | | | | |
| Production | 791 | 827 | + 4.5 | 5,629 | 5,822 | + 3.4 | 5 |
| % of Capacity | 92 | 96 | | 97 | 99 | | 7 |
| Shipments | 779 | 794 | + 2.0 | 5,620 | 5,668 | + 0.9 | 5 |
| Total U.S. Est. Consumption | | | | | | | 6 |
| Daily Newspapers | 726 | 743P | + 2.3 | 5,273 | 5,344 | + 1.3 | |
| All Users | 967 | 983P | + 1.7 | 6,918 | 7,035 | + 1.7 | |
| Publishers Stock ANPA Survey of Newspapers | 931 | 982P | + 5.5 | //////////////////////////////// | //////////////////////////////// | //////////////////////////////// | 7 |
| North American Mills - Stocks | 328 | 408 | +24.1 | //////////////////////////////// | //////////////////////////////// | //////////////////////////////// | 3 |

* Additional information proceeds as follows: Shipments by Destination - 8 & 9; Historical Data - 10; Circulations - 10; Forecasts of U.S. Economy - 11; Overseas Newsprint Statistics - 12; Overseas Newsprint Capacity - 13; Capacity Information / U.S. and Canadian Mills - 14.

UNITED STATES COMPANIES PARTICIPATING IN REPORT

| | | |
|---|---|---|
| Augusta Newsprint Company | FSC Paper Company, L.P. | Manistique Papers, Inc. |
| Bear Island Paper Company | Garden State Paper Company | North Pacific Paper Company |
| Boise Cascade Corporation | Great Northern Paper Company | Smurfit Newsprint Corporation |
| Bowater Inc. | Inland Empire Paper Company | Southeast Paper Mfg. Company |
| Champion International Corp. | James River Corporation | Stone Container Corporation |

Data for non-reporting company have been estimated.

P - Preliminary

In addition to the above contributing companies, the inputs for this report are dependent upon data received from the Canadian Pulp & Paper Association, the American Newspaper Publishers Association, and the U.S. Bureau of Census.

(In Thousands of Metric Tonnes)

# NEWSPRINT STATISTICS

(Not Seasonally Adjusted)

## NORTH AMERICA

| | PRODUCTION | | | | SHIPMENTS | | | | STOCKS-END OF MONTH | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 1,192.1 | 1,238.9 | 1,274.1 | +2.8 | 1.099.8 | 1,176.6 | 1,152.7 | -2.0 | 439.2 | 388.6 | 346.6 | -10.8 |
| February | 1,120.0 | 1,165.2 | 1,249.0 | +7.2 | 1,090.1 | 1,158.0 | 1,217.0 | +5.1 | 469.2 | 395.9 | 378.6 | - 4.4 |
| March | 1,190.2 | 1,278.8 | 1,336.9 | +4.5 | 1,187.8 | 1,288.3 | 1,339.3 | +4.0 | 471.7 | 386.4 | 376.1 | - 2.7 |
| April | 1,185.7 | 1,227.0 | 1,277.2 | +4.1 | 1,215.4 | 1,245.5 | 1,234.7 | -0.9 | 441.9 | 367.9 | 418.6 | +13.8 |
| May | 1,228.7 | 1,269.7 | 1,326.0 | +4.4 | 1,214.2 | 1,267.6 | 1,318.5 | +4.0 | 456.4 | 370.0 | 426.1 | +15.2 |
| June | 1,189.7 | 1,250.6 | 1,243.4 | -0.6 | 1,231.9 | 1,307.9 | 1,299.5 | -0.6 | 414.2 | 312.8 | 370.0 | +18.3 |
| July | 1,250.6 | 1,246.4 | 1,262.7 | +1.3 | 1,191.2 | 1,230.7 | 1,224.9 | -0.5 | 473.5 | 328.5 | 407.7 | +24.1 |
| August | 1,220.6 | 1,277.7 | | | 1,233.7 | 1,234.5 | | | 460.5 | 371.7 | | |
| September | 1,163.4 | 1,244.9 | | | 1,277.7 | 1,303.4 | | | 346.2 | 313.3 | | |
| October | 1,234.1 | 1,287.5 | | | 1,252.2 | 1,266.6 | | | 328.2 | 334.1 | | |
| November | 1,210.6 | 1,249.5 | | | 1,169.1 | 1,239.9 | | | 369.6 | 343.7 | | |
| December | 1,210.8 | 1,236.4 | | | 1,254.2 | 1,352.4 | | | 326.3 | 225.2 | | |
| 7 Months | 8,357.0 | 8,676.6 | 8,969.3 | +3.4 | 8,230.4 | 8,674.6 | 8,786.6 | +1.3 | | | | |
| TOTAL YEAR | 14,396.5 | 14,972.6 | | | 14,417.3 | 15,071.4 | | | | | | |

## DISTRIBUTION OF NORTH AMERICAN SHIPMENTS

| | TO UNITED STATES | | | | TO CANADA | | | | TO OTHER MARKETS | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 891.9 | 950.7 | 961.1 | +1.1 | 83.6 | 85.3 | 92.1 | +8.0 | 124.3 | 140.6 | 99.5 | -29.2 |
| February | 888.6 | 921.0 | 986.6 | +7.1 | 84.2 | 92.1 | 97.8 | +6.2 | 117.3 | 144.9 | 132.6 | - 8.5 |
| March | 948.7 | 1,019.7 | 1,074.4 | +5.4 | 90.2 | 111.9 | 108.1 | -3.4 | 148.9 | 156.7 | 156.8 | + 0.1 |
| April | 977.0 | 991.6 | 995.5 | +0.4 | 97.6 | 95.3 | 100.3 | +5.2 | 140.8 | 158.6 | 138.9 | -12.4 |
| May | 973.6 | 1,013.4 | 1,026.4 | +1.3 | 92.3 | 95.1 | 107.1 | +12.6 | 148.3 | 159.1 | 185.0 | +16.3 |
| June | 964.9 | 1,046.8 | 1,011.5 | -3.4 | 93.4 | 93.1 | 103.0 | +10.6 | 173.6 | 168.0 | 185.0 | +10.1 |
| July | 955.4 | 1,003.4 | 964.1 | -3.9 | 88.7 | 87.6 | 99.2 | +13.2 | 147.1 | 139.7 | 161.6 | +15.7 |
| August | 986.4 | 996.3 | | | 86.9 | 94.9 | | | 160.4 | 143.3 | | |
| September | 999.4 | 1,065.9 | | | 95.5 | 102.6 | | | 182.8 | 134.9 | | |
| October | 997.9 | 1,028.7 | | | 102.3 | 105.5 | | | 152.0 | 132.4 | | |
| November | 924.4 | 1,009.4 | | | 99.6 | 108.9 | | | 145.1 | 121.6 | | |
| December | 1,004.1 | 1,066.0 | | | 107.0 | 111.0 | | | 143.1 | 175.4 | | |
| 7 Months | 6,600.1 | 6,946.6 | 7,019.6 | +1.1 | 630.0 | 660.4 | 707.6 | +7.1 | 1,000.3 | 1,067.6 | 1,059.4 | -0.8 |
| TOTAL YEAR | 11,512.3 | 12,112.9 | | | 1,121.3 | 1,183.3 | | | 1,783.7 | 1,775.2 | | |

SOURCE: Newsprint Division, American Paper Institute and Newsprint Section, Canadian Pulp and Paper Association.

# NEWSPRINT STATISTICS

(In Thousands of Metric Tonnes)

(Not Seasonally Adjusted)

## UNITED STATES

| | PRODUCTION | | | | SHIPMENTS | | | | STOCKS-END OF MONTH | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 420.2 | 444.8 | 452.3 | +1.7 | 386.9 | 427.1 | 437.2 | +2.4 | 89.8 | 66.8 | 51.2 | -23.4 |
| February | 393.6 | 400.1 | 434.4 | +8.6 | 393.7 | 402.3 | 434.9 | +8.1 | 89.8 | 64.6 | 50.7 | -21.5 |
| March | 443.5 | 430.7 | 462.6 | +7.4 | 434.2 | 441.8 | 458.2 | +3.7 | 99.1 | 53.5 | 55.0 | + 2.8 |
| April | 409.1 | 419.5 | 451.0 | +7.5 | 415.3 | 427.8 | 446.1 | +4.3 | 92.9 | 45.2 | 59.9 | +32.5 |
| May | 446.0 | 453.8 | 466.0 | +2.7 | 443.4 | 452.4 | 462.8 | +2.3 | 95.5 | 46.6 | 63.2 | +35.6 |
| June | 419.7 | 444.3 | 444.8 | +0.1 | 425.4 | 451.1 | 448.6 | -0.6 | 89.8 | 39.9 | 59.4 | +48.9 |
| July | 432.8 | 455.0 | 435.9 | -4.2 | 433.2 | 451.9 | 430.7 | -4.7 | 89.3 | 42.9 | 64.5 | +50.3 |
| August | 440.8 | 452.0 | | | 443.7 | 449.4 | | | 86.4 | 45.6 | | |
| September | 419.5 | 448.2 | | | 437.3 | 451.3 | | | 68.6 | 42.5 | | |
| October | 425.7 | 460.9 | | | 436.4 | 455.6 | | | 58.0 | 47.8 | | |
| November | 428.9 | 437.4 | | | 426.0 | 439.1 | | | 60.8 | 46.1 | | |
| December | 427.7 | 453.0 | | | 439.5 | 460.6 | | | 49.1 | 36.1 | | |
| 7 Months | 2,964.9 | 3,048.2 | 3,147.0 | +3.2 | 2,932.1 | 3,054.4 | 3,118.5 | +2.1 | | | | |
| TOTAL YEAR | 5,107.5 | 5,299.7 | | | 5,115.0 | 5,310.4 | | | | | | |

| | DISTRIBUTION OF UNITED STATES SHIPMENTS | | | | | | | | SHIPMENTS TO THE UNITED STATES From Overseas | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | TO UNITED STATES | | | | TO OTHER MARKETS | | | | | | | |
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 368.5 | 397.6 | 412.7 | +3.8 | 18.4 | 29.5 | 24.5 | -16.9 | 44.8 | 14.6 | 16.5 | +13.0 |
| February | 367.0 | 380.3 | 411.9 | +8.3 | 26.7 | 22.0 | 23.0 | + 4.5 | 14.1 | 21.1 | 20.0 | - 5.2 |
| March | 408.2 | 416.2 | 435.6 | +4.7 | 26.0 | 25.6 | 22.6 | -11.7 | 25.3 | 25.0 | 23.1 | - 7.6 |
| April | 394.9 | 396.6 | 419.8 | +5.8 | 20.4 | 31.2 | 26.3 | -15.7 | 29.6 | 32.8 | 35.0 | + 6.7 |
| May | 413.3 | 427.1 | 435.0 | +1.8 | 30.1 | 25.3 | 27.8 | + 9.9 | 22.7 | 21.9 | 19.5 | -11.0 |
| June | 396.1 | 426.7 | 421.1 | -1.3 | 29.3 | 24.4 | 27.5 | +12.7 | 26.2 | 32.1 | 22.9 | -28.7 |
| July | 397.3 | 427.6 | 390.4 | -8.7 | 35.9 | 24.3 | 40.3 | +65.8 | 19.7 | 31.0 | | |
| August | 414.6 | 428.8 | | | 29.1 | 20.6 | | | 39.4 | 29.1 | | |
| September | 408.1 | 434.6 | | | 29.2 | 16.7 | | | 11.7 | 37.0 | | |
| October | 403.5 | 436.0 | | | 32.9 | 19.6 | | | 32.0 | 32.7 | | |
| November | 395.5 | 412.2 | | | 30.5 | 26.9 | | | 21.8 | 41.6 | | |
| December | 410.6 | 442.6 | | | 28.9 | 18.0 | | | 14.1 | 37.1 | (6 Mos. Y-T-D) | |
| 7 Months | 2,745.3 | 2,872.1 | 2,926.5 | +1.9 | 186.8 | 182.3 | 192.0 | +5.3 | 162.7 | 147.5 | 137.0 | -7.1 |
| TOTAL YEAR | 4,777.6 | 5,026.3 | | | 337.4 | 284.1 | | | 301.4 | 356.0 | | |

SOURCE: Newsprint Division, American Paper Institute and Bureau of Census.

(In Thousands of Metric Tonnes)

# NEWSPRINT STATISTICS (Not Seasonally Adjusted)



## CANADA

| | PRODUCTION | | | | SHIPMENTS | | | | STOCKS-END OF MONTH | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 771.9 | 794.1 | 821.8 | +3.5 | 712.9 | 749.5 | 715.5 | -4.5 | 349.4 | 321.8 | 295.4 | -8.2 |
| February | 726.4 | 765.1 | 814.6 | +6.5 | 696.4 | 755.7 | 782.1 | +3.5 | 379.4 | 331.3 | 327.9 | -1.0 |
| March | 746.7 | 848.1 | 874.3 | +3.1 | 753.6 | 846.5 | 881.1 | +4.1 | 372.6 | 332.9 | 321.1 | -3.5 |
| April | 776.6 | 807.5 | 826.2 | +2.3 | 800.1 | 817.7 | 788.6 | -3.6 | 349.0 | 322.7 | 358.7 | +11.2 |
| May | 782.7 | 815.9 | 860.0 | +5.4 | 770.8 | 815.2 | 855.7 | +5.0 | 360.9 | 323.4 | 362.9 | +12.2 |
| June | 770.0 | 806.3 | 798.6 | -1.0 | 806.5 | 856.8 | 850.9 | -0.7 | 324.4 | 272.9 | 310.6 | +13.8 |
| July | 817.8 | 791.4 | 826.8 | +4.5 | 758.0 | 778.8 | 794.2 | +2.0 | 384.2 | 285.6 | 343.2 | +20.2 |
| August | 779.8 | 825.7 | | | 790.0 | 785.1 | | | 374.1 | 326.1 | | |
| September | 743.9 | 796.7 | | | 840.4 | 852.1 | | | 277.6 | 270.8 | | |
| October | 808.4 | 826.6 | | | 815.8 | 811.0 | | | 270.2 | 286.3 | | |
| November | 781.7 | 812.1 | | | 743.1 | 800.8 | | | 308.8 | 297.6 | | |
| December | 783.1 | 783.4 | | | 814.7 | 891.8 | | | 277.2 | 189.1 | | |
| 7 Months | 5,392.1 | 5,628.4 | 5,822.3 | +3.4 | 5,298.3 | 5,620.2 | 5,668.1 | +0.9 | | | | |
| TOTAL YEAR | 9,289.0 | 9,672.9 | | | 9,302.3 | 9,761.0 | | | | | | |

## DISTRIBUTION OF CANADIAN SHIPMENTS

| | TO UNITED STATES | | | | TO CANADA | | | | TO OTHER MARKETS | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 523.4 | 553.1 | 548.4 | -0.8 | 83.6 | 85.3 | 92.1 | +8.0 | 105.9 | 111.1 | 75.0 | -32.5 |
| February | 521.6 | 540.7 | 574.7 | +6.3 | 84.2 | 92.1 | 97.8 | +6.2 | 90.6 | 122.9 | 109.6 | -10.8 |
| March | 540.5 | 603.5 | 638.8 | +5.8 | 90.2 | 111.9 | 108.1 | -3.4 | 122.9 | 131.1 | 134.2 | + 2.4 |
| April | 582.1 | 595.0 | 575.7 | -3.2 | 97.6 | 95.3 | 100.3 | +5.2 | 120.4 | 127.4 | 112.6 | -11.6 |
| May | 560.3 | 586.3 | 591.4 | +0.9 | 92.3 | 95.1 | 107.1 | +12.6 | 118.2 | 133.8 | 157.2 | +17.5 |
| June | 568.8 | 620.1 | 590.4 | -4.8 | 93.4 | 93.1 | 103.0 | +10.6 | 144.3 | 143.6 | 157.5 | + 9.7 |
| July | 558.1 | 575.8 | 573.7 | -0.4 | 88.7 | 87.6 | 99.2 | +13.2 | 111.2 | 115.4 | 121.3 | +5.1 |
| August | 571.8 | 567.5 | | | 86.9 | 94.9 | | | 131.3 | 122.7 | | |
| September | 591.3 | 631.3 | | | 95.5 | 102.6 | | | 153.6 | 118.2 | | |
| October | 594.4 | 592.7 | | | 102.3 | 105.5 | | | 119.1 | 112.8 | | |
| November | 528.9 | 597.2 | | | 99.6 | 108.9 | | | 114.6 | 94.7 | | |
| December | 593.5 | 623.4 | | | 107.0 | 111.0 | | | 114.2 | 157.4 | | |
| 7 Months | 3,854.8 | 4,074.5 | 4,093.1 | +0.5 | 630.0 | 660.4 | 707.6 | +7.1 | 813.5 | 885.3 | 867.4 | -2.0 |
| TOTAL YEAR | 6,734.7 | 7,086.6 | | | 1,121.3 | 1,183.3 | | | 1,446.3 | 1,491.1 | | |

SOURCE: Newsprint Section, Canadian Pulp and Paper Association.

# NEWSPRINT STATISTICS

(i.. Thousands of Metric Tonnes) (Not Seasonally Adjusted)

| | TOTAL UNITED STATES ESTIMATED CONSUMPTION | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | DAILY NEWSPAPERS (1) | | | | ALL USERS | | | | DAILY NEWSPAPERS TO TOTAL ALL USERS | | |
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 |
| January | 684.3 | 699.0 | 724.8 | +3.7 | 918.0 | 908.0 | 958.0 | +5.5 | 74.5 | 77.0 | 75.7 |
| February | 665.5 | 698.6 | 734.3 | +5.1 | 881.0 | 906.0 | 964.0 | +6.4 | 75.5 | 77.1 | 76.2 |
| March | 756.3 | 796.4 | 805.0 | +1.1 | 1,004.0 | 1,037.0 | 1,059.0 | +2.1 | 75.3 | 76.8 | 76.0 |
| April | 740.4 | 785.1 | 778.4 | -0.9 | 1,000.0 | 1,031.0 | 1,023.0 | -0.8 | 74.0 | 76.1 | 76.1 |
| May | 764.6 | 815.6 | 807.3 | -1.0 | 1,035.0 | 1,073.0 | 1,058.0R | -1.4 | 73.9 | 76.0 | 76.3R |
| June | 731.9 | 752.6 | 751.4R | -0.2 | 996.0 | 996.0 | 990.0R | -0.6 | 73.5 | 75.6 | 75.9R |
| July | 679.6 | 726.0 | 743.0P | +2.3 | 931.0 | 967.0 | 983.0P | +1.7 | 73.0 | 75.1 | 75.6P |
| August | 734.2 | 771.4 | | | 997.0 | 1,041.0 | | | 73.6 | 74.1 | |
| September | 734.6 | 777.1 | | | 999.0 | 1,050.0 | | | 73.5 | 74.0 | |
| October | 801.8 | 841.7 | | | 1,088.0 | 1,129.0 | | | 73.7 | 74.6 | |
| November | 809.0 | 845.5 | | | 1,078.0 | 1,134.0 | | | 75.0 | 74.6 | |
| December | 762.9 | 794.3 | | | 1,010.0 | 1,050.0 | | | 75.5 | 75.6 | |
| 7 Months | 5,022.6 | 5,273.3 | 5,344.2 | +1.3 | 6,765.0 | 6,918.0 | 7,035.0 | +1.7 | | | |
| TOTAL YEAR | 8,865.1 | 9,303.3(2) | | | 11,937.0 | 12,322.0 | | | | | |

P - Preliminary R - Revised

(1) Based on data from ANPA - member newspapers in statistical sample.

(2) ANPA's annual report for consumption by daily newpapers for 1987 = 9,124.7 - the monthly figures will be revised in a future report.

(Seasonally Adjusted)

| | TOTAL UNITED STATES ESTIMATED CONSUMPTION | | | | | | | | TOTAL NORTH AMERICAN SHIPMENTS | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | DAILY NEWSPAPERS | | | | ALL USERS | | | | | | | |
| | Seas.Adj.-3 Mon.Moving Avg. Annual Basis | | | | Seas.Adj.-3 Mon.Moving Avg. Annual Basis | | | | Seasonally Adjusted-Annual Basis | | | |
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change |
| January | 8,746 | 9,186 | 9,402 | +2.4 | 11,740 | 11,930 | 12,420 | +4.1 | 13,628 | 14,668 | 14,569 | -0.7 |
| February | 8,894 | 9,306 | 9,518 | +2.3 | 11,780 | 12,070 | 12,490 | +3.5 | 14,035 | 14,881 | 15,004 | +0.8 |
| March | 8,870 | 9,324 | 9,439 | +1.2 | 11,780 | 12,140 | 12,420 | +2.3 | 13,986 | 14,992 | 15,478 | +3.2 |
| April | 8,784 | 9,269 | 9,368 | +1.1 | 11,870 | 12,180 | 12,310 | +1.1 | 14,514 | 15,011 | 14,700 | -2.1 |
| May | 8,846 | 9,302 | 9,270R | -0.3 | 11,970 | 12,240 | 12,150R | -0.7 | 14,344 | 15,182 | 15,730 | +3.6 |
| June | 8,857 | 9,344 | 9,283R | -0.7 | 12,050 | 12,360 | 12,230R | -1.1 | 14,495 | 15,064 | 15,196 | +0.9 |
| July | 8,833 | 9,387 | 9,269P | -1.3 | 12,100 | 12,500 | 12,260P | -1.9 | 14,539 | 14,934 | 15,128 | +1.3 |
| August | 8,920 | 9,329 | | | 12,120 | 12,590 | | | 14,880 | 14,950 | | |
| September | 8,908 | 9,331 | | | 12,120 | 12,610 | | | 15,062 | 15,428 | | |
| October | 8,859 | 9,355 | | | 12,020 | 12,540 | | | 14,560 | 14,843 | | |
| November | 8,955 | 9,288 | | | 11,940 | 12,450 | | | 14,466 | 15,229 | | |
| December | 8,947 | 9,390 | | | 11,850 | 12,420 | | | 14,627 | 15,864 | | |
| 7 Months Average Annual Rate | 8,833 | 9,303 | 9,364 | +0.7 | 11,899 | 12,203 | 12,326 | +1.0 | | | | |

P - Preliminary R - Revised

SOURCE: American Newspaper Publishers Association, Newsprint Division, American Paper Institute and Newsprint Section, Canadian Pulp and Paper Association.

# NEWSPRINT STATISTICS



(In Thousands of Metric Tonnes)

| | ANPA SURVEY OF NEWSPAPERS PUBLISHERS STOCK - END OF MONTH | | | | | | | | End of Month - Day's Supply - Consumers' Stocks on Hand & in Transit (1) | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | UNADJUSTED | | | | SEASONALLY ADJUSTED | | | | ANPA SURVEY | | |
| | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 | % Change | 1986 | 1987 | 1988 |
| January | 920.2 | 845.2 | 905.2 | + 7.1 | 937.1 | 859.8 | 919.9 | + 7.0 | 46 | 41 | 44 |
| February | 926.6 | 878.6 | 931.0 | + 6.0 | 914.7 | 867.3 | 919.1 | + 6.0 | 45 | 42 | 44 |
| March | 903.6 | 874.0 | 962.3 | +10.1 | 900.0 | 870.5 | 959.4 | +10.2 | 44 | 41 | 45 |
| April | 889.3 | 869.3 | 971.8 | +11.8 | 890.2 | 869.3 | 971.8 | +11.8 | 43 | 40 | 46 |
| May | 870.1 | 847.5 | 951.5 | +12.3 | 888.8 | 865.7 | 971.9 | +12.3 | 43 | 41 | 46 |
| June | 868.9 | 885.2 | 989.5R | +11.8 | 864.6 | 883.4 | 988.5R | +11.9 | 47 | 47 | 51 |
| July | 892.1 | 931.3 | 982.3P | + 5.5 | 865.3 | 904.2 | 953.7P | + 5.5 | 45 | 45 | 49P |
| August | 892.8 | 904.6 | | | 856.8 | 869.8 | | | 44 | 43 | |
| September | 904.3 | 929.1 | | | 878.8 | 901.2 | | | 42 | 42 | |
| October | 887.5 | 897.4 | | | 893.8 | 902.8 | | | 40 | 39 | |
| November | 803.0 | 866.2 | | | 847.9 | 914.7 | | | 40 | 42 | |
| December | 848.6 | 900.3 | | | 868.6 | 922.4 | | | 45 | 47 | |

P - Preliminary R - Revised

(1) Since stocks represent paper to be printed in the future, the Day's Supply is calculated by dividing publishers stocks in tons by the projected consumption in the next following month.

The projected consumption is based on the assumption that the seasonal adjusted rate in the coming month will be equal to the average of the two preceding months.

SOURCE: American Newspaper Publishers Association.

| | OPERATING RATES | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | UNITED STATES | | | CANADA | | | NORTH AMERICA | | |
| | 1986 | 1987 | 1988 | 1986 | 1987 | 1988 | 1986 | 1987 | 1988 |
| January | 92.7 | 95.5 | 96.3 | 94 | 97 | 99 | 93.5 | 96.5 | 98.0 |
| February | 96.2 | 95.2 | 98.9 | 94 | 99 | 101 | 94.8 | 97.7 | 100.3 |
| March | 97.8 | 92.5 | 98.4 | 89 | 100 | 100 | 92.1 | 97.3 | 99.5 |
| April | 93.3 | 93.1 | 99.2 | 92 | 99 | 99 | 92.4 | 96.9 | 99.1 |
| May | 98.4 | 97.5 | 99.2 | 94 | 97 | 100 | 95.5 | 97.2 | 99.7 |
| June | 95.7 | 98.6 | 97.8 | 94 | 97 | 97 | 94.6 | 97.6 | 97.3 |
| July | 97.7 | 100.0 | 94.9 | 96 | 92 | 96 | 96.6 | 94.8 | 95.6 |
| August | 97.2 | 97.1 | | 93 | 98 | | 94.5 | 97.7 | |
| September | 95.7 | 99.5 | | 91 | 96 | | 92.6 | 97.2 | |
| October | 93.9 | 99.0 | | 97 | 97 | | 95.9 | 97.7 | |
| November | 97.8 | 97.1 | | 97 | 99 | | 97.3 | 98.3 | |
| December | 96.6 | 99.6 | | 97 | 97 | | 96.8 | 97.9 | |
| **7 Months** | **96.0** | **96.1** | **97.8** | **93** | **97** | **99** | **94.2** | **96.8** | **98.5** |
| **TOTAL YEAR** | **96.1** | **97.1** | | **94** | **97** | | **94.7** | **97.2** | |

SOURCE: Newsprint Division, American Paper Institute and Newsprint Section, Canadian Pulp and Paper Association.

# NEWSPRINT SHIPMENTS BY DESTINATION

(In Thousands of Metric Tonnes)

| YEAR | NORTH-EAST | EAST NORTH CENTRAL | WEST NORTH CENTRAL | SOUTH ATLANTIC | EAST SOUTH CENTRAL | WEST SOUTH CENTRAL | MOUNTAIN | PACIFIC | TOTAL DOMESTIC SHIPMENTS |
|---|---|---|---|---|---|---|---|---|---|
| **United States** | | | | | | | | | |
| 1971 | 429 | 253 | 176 | 495 | 269 | 658 | 95 | 625 | 3,000 |
| 1972 | 453 | 281 | 182 | 548 | 283 | 696 | 117 | 659 | 3,219 |
| 1973 | 432 | 279 | 172 | 575 | 321 | 748 | 161 | 630 | 3,318 |
| 1974* | 425 | 230 | 160 | 562 | 315 | 730 | 158 | 670 | 3,250 |
| 1974 | 411 | 221 | 154 | 543 | 304 | 705 | 152 | 646 | 3,136 |
| 1975 | 463 | 254 | 193 | 551 | 299 | 701 | 142 | 632 | 3,235 |
| 1976 | 479 | 234 | 185 | 589 | 300 | 735 | 136 | 637 | 3,295 |
| 1977 | 493 | 216 | 187 | 591 | 303 | 743 | 151 | 706 | 3,390 |
| 1978 | 429 | 199 | 174 | 540 | 307 | 849 | 168 | 667 | 3,333 |
| 1979 | 446 | 202 | 187 | 614 | 318 | 884 | 156 | 765 | 3,602 |
| 1980 | 468 | 238 | 193 | 813 | 325 | 940 | 222 | 859 | 4,058 |
| 1981 | 459 | 241 | 196 | 885 | 321 | 1,018 | 260 | 1,072 | 4,452 |
| 1982 | 453 | 269 | 178 | 801 | 314 | 1,008 | 238 | 990 | 4,251 |
| 1983 | 461 | 295 | 183 | 920 | 302 | 1,035 | 242 | 971 | 4,409 |
| 1984 | 487 | 297 | 160 | 1,042 | 315 | 1,136 | 266 | 1,104 | 4,807 |
| 1985 | 489 | 292 | 151 | 1,069 | 310 | 1,060 | 243 | 1,034 | 4,648 |
| 1986 | 538 | 304 | 154 | 1,117 | 322 | 974 | 277 | 1,091 | 4,777 |
| 1987 | 560 | 311 | 151 | 1,210 | 347 | 994 | 288 | 1,165 | 5,026 |
| **Canada** | | | | | | | | | |
| 1971 | 1,969 | 1,660 | 358 | 589 | 103 | 24 | 187 | 686 | 5,576 |
| 1972 | 2,079 | 1,694 | 408 | 669 | 117 | 37 | 176 | 653 | 5,833 |
| 1973 | 2,122 | 1,746 | 434 | 789 | 128 | 55 | 196 | 749 | 6,219 |
| 1974* | 2,237 | 1,920 | 456 | 807 | 159 | 73 | 192 | 723 | 6,867 |
| 1974 | 2,147 | 1,842 | 438 | 775 | 152 | 71 | 185 | 694 | 6,304 |
| 1975 | 1,711 | 1,480 | 315 | 570 | 93 | 62 | 145 | 603 | 4,979 |
| 1976 | 1,779 | 1,659 | 417 | 727 | 129 | 78 | 181 | 701 | 5,671 |
| 1977 | 1,873 | 1,607 | 387 | 739 | 111 | 74 | 204 | 756 | 5,751 |
| 1978 | 1,946 | 1,812 | 466 | 848 | 125 | 62 | 220 | 964 | 6,443 |
| 1979 | 1,974 | 1,813 | 480 | 755 | 132 | 73 | 229 | 915 | 6,371 |
| 1980 | 2,017 | 1,691 | 437 | 658 | 151 | 73 | 203 | 888 | 6,118 |
| 1981 | 2,099 | 1,683 | 427 | 689 | 161 | 60 | 210 | 732 | 6,061 |
| 1982 | 1,953 | 1,448 | 401 | 663 | 153 | 66 | 217 | 694 | 5,595 |
| 1983 | 2,099 | 1,493 | 441 | 685 | 182 | 104 | 248 | 782 | 6,034 |
| 1984 | 2,270 | 1,623 | 517 | 780 | 241 | 128 | 281 | 745 | 6,585 |
| 1985 | 2,275 | 1,631 | 509 | 738 | 252 | 163 | 268 | 838 | 6,674 |
| 1986 | 2,351 | 1,599 | 506 | 733 | 245 | 156 | 257 | 888 | 6,735 |
| 1987 | 2,495 | 1,672 | 538 | 805 | 229 | 176 | 303 | 869 | 7,087 |
| **North America** | | | | | | | | | |
| 1971 | 2,398 | 1,913 | 534 | 1,084 | 372 | 682 | 282 | 1,311 | 8,576 |
| 1972 | 2,532 | 1,975 | 590 | 1,217 | 400 | 733 | 293 | 1,312 | 9,052 |
| 1973 | 2,554 | 2,025 | 606 | 1,364 | 449 | 803 | 357 | 1,379 | 9,537 |
| 1974* | 2,662 | 2,150 | 616 | 1,369 | 474 | 803 | 350 | 1,393 | 9,817 |
| 1974 | 2,558 | 2,063 | 592 | 1,318 | 456 | 776 | 337 | 1,340 | 9,440 |
| 1975 | 2,174 | 1,734 | 508 | 1,121 | 392 | 763 | 287 | 1,235 | 8,214 |
| 1976 | 2,258 | 1,893 | 602 | 1,316 | 429 | 813 | 317 | 1,338 | 8,966 |
| 1977 | 2,366 | 1,823 | 574 | 1,330 | 414 | 817 | 355 | 1,462 | 9,141 |
| 1978 | 2,375 | 2,011 | 640 | 1,388 | 432 | 911 | 388 | 1,631 | 9,776 |
| 1979 | 2,420 | 2,015 | 667 | 1,369 | 450 | 957 | 415 | 1,680 | 9,973 |
| 1980 | 2,485 | 1,929 | 630 | 1,471 | 476 | 1,013 | 425 | 1,747 | 10,176 |
| 1981 | 2,558 | 1,924 | 623 | 1,574 | 482 | 1,078 | 470 | 1,804 | 10,513 |
| 1982 | 2,406 | 1,717 | 579 | 1,464 | 467 | 1,074 | 455 | 1,684 | 9,846 |
| 1983 | 2,560 | 1,788 | 624 | 1,605 | 484 | 1,139 | 490 | 1,753 | 10,443 |
| 1984 | 2,757 | 1,920 | 677 | 1,822 | 556 | 1,264 | 547 | 1,849 | 11,392 |
| 1985 | 2,764 | 1,923 | 660 | 1,807 | 562 | 1,223 | 511 | 1,872 | 11,322 |
| 1986 | 2,889 | 1,903 | 660 | 1,850 | 567 | 1,130 | 534 | 1,979 | 11,512 |
| 1987 | 3,055 | 1,983 | 689 | 2,015 | 576 | 1,170 | 591 | 2,034 | 12,113 |

SOURCE: Newsprint Division, American Paper Institute and Newsprint Section, Canadian Pulp & Paper Association.

*Years 1971-1974 are predominately 32 lb. basis weight (52 g/m$^2$);years 1974-1987 are predominately 30 lb. basis weight (48.8 g/m$^2$)

# NORTH AMERICAN
## NEWSPRINT SHIPMENTS BY DESTINATION



(In Thousands of Metric Tonnes)

| REGION | QUARTER | UNITED STATES | | | CANADA | | | TOTAL NORTH AMERICA | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 1987 | 1988 | % CHG. | 1987 | 1988 | % CHG. | 1987 | 1988 | % CHG. |
| New England | 1 Q | 37.3 | 41.7 | +11.8 | 139.6 | 140.7 | + 0.8 | 176.9 | 182.4 | + 3.1 |
| | 2 Q | 44.9 | 45.9 | + 2.2 | 157.0 | 157.6 | + 0.4 | 201.9 | 203.5 | + 0.8 |
| | 3 Q | 46.3 | | | 167.2 | | | 213.5 | | |
| | 4 Q | 51.7 | | | 167.9 | | | 219.6 | | |
| | Year | 180.2 | | | 631.7 | | | 811.9 | | |
| Middle Atlantic | 1 Q | 89.6 | 90.0 | + 0.4 | 451.0 | 464.2 | + 2.9 | 540.6 | 554.2 | + 2.5 |
| | 2 Q | 97.8 | 94.9 | - 3.0 | 486.8 | 436.5 | -10.3 | 584.6 | 531.4 | - 9.1 |
| | 3 Q | 102.7 | | | 453.7 | | | 556.4 | | |
| | 4 Q | 89.7 | | | 471.5 | | | 561.2 | | |
| | Year | 379.8 | | | 1,863.0 | | | 2,242.8 | | |
| East North Central | 1 Q | 67.2 | 71.8 | + 6.8 | 396.5 | 417.0 | + 5.2 | 463.7 | 488.8 | + 5.4 |
| | 2 Q | 76.7 | 72.9 | - 5.0 | 416.4 | 407.3 | - 2.2 | 493.1 | 480.2 | - 2.6 |
| | 3 Q | 84.8 | | | 418.7 | | | 503.5 | | |
| | 4 Q | 82.3 | | | 440.0 | | | 522.3 | | |
| | Year | 311.0 | | | 1,671.6 | | | 1,982.6 | | |
| West North Central | 1 Q | 38.3 | 34.2 | -10.7 | 131.1 | 138.2 | + 5.4 | 169.4 | 172.4 | + 1.8 |
| | 2 Q | 37.8 | 33.5 | -11.4 | 137.0 | 139.6 | + 1.9 | 174.8 | 173.1 | - 1.0 |
| | 3 Q | 37.4 | | | 136.4 | | | 173.8 | | |
| | 4 Q | 37.9 | | | 133.6 | | | 171.5 | | |
| | Year | 151.4 | | | 538.1 | | | 689.5 | | |
| South Atlantic | 1 Q | 295.6 | 323.9 | + 9.6 | 205.7 | 203.3 | - 1.2 | 501.3 | 527.2 | + 5.2 |
| | 2 Q | 304.3 | 312.5 | + 2.7 | 220.6 | 213.4 | - 3.3 | 524.9 | 525.9 | + 0.2 |
| | 3 Q | 304.1 | | | 188.8 | | | 492.9 | | |
| | 4 Q | 305.7 | | | 190.1 | | | 495.8 | | |
| | Year | 1,209.7 | | | 805.2 | | | 2,014.9 | | |
| East South Central | 1 Q | 87.9 | 85.9 | - 2.3 | 54.2 | 63.0 | +16.2 | 142.1 | 148.9 | + 4.8 |
| | 2 Q | 87.6 | 93.0 | + 6.2 | 49.3 | 56.1 | +13.8 | 136.9 | 149.1 | + 8.9 |
| | 3 Q | 88.3 | | | 57.5 | | | 145.8 | | |
| | 4 Q | 83.5 | | | 67.4 | | | 150.9 | | |
| | Year | 347.3 | | | 228.4 | | | 575.7 | | |
| West South Central | 1 Q | 226.9 | 234.4 | + 3.3 | 42.7 | 38.9 | - 8.9 | 269.6 | 273.3 | + 1.4 |
| | 2 Q | 255.9 | 247.5 | - 3.3 | 41.3 | 49.5 | +19.9 | 297.2 | 297.0 | - 0.1 |
| | 3 Q | 254.9 | | | 41.2 | | | 296.1 | | |
| | 4 Q | 256.4 | | | 50.6 | | | 307.0 | | |
| | Year | 994.1 | | | 175.8 | | | 1,169.9 | | |
| Mountain | 1 Q | 67.6 | 75.7 | +12.0 | 75.6 | 69.3 | - 8.3 | 143.2 | 145.0 | + 1.3 |
| | 2 Q | 70.6 | 71.4 | + 1.1 | 74.9 | 68.2 | - 8.9 | 145.5 | 139.6 | - 4.1 |
| | 3 Q | 72.7 | | | 79.6 | | | 152.3 | | |
| | 4 Q | 77.4 | | | 73.2 | | | 150.6 | | |
| | Year | 288.3 | | | 303.3 | | | 591.6 | | |
| Pacific | 1 Q | 283.7 | 302.6 | + 6.7 | 200.9 | 227.3 | +13.1 | 484.6 | 529.9 | + 9.3 |
| | 2 Q | 274.8 | 304.3 | +10.7 | 218.1 | 229.3 | + 5.1 | 492.9 | 533.6 | + 8.3 |
| | 3 Q | 299.8 | | | 231.5 | | | 531.3 | | |
| | 4 Q | 306.2 | | | 219.0 | | | 525.2 | | |
| | Year | 1,164.5 | | | 869.5 | | | 2,034.0 | | |
| TOTAL DOMESTIC SHIPMENTS | 1 Q | 1,194.1 | 1,260.2 | + 5.5 | 1,697.3 | 1,761.9 | + 3.8 | 2,891.4 | 3,022.1 | + 4.5 |
| | 2 Q | 1,250.4 | 1,275.9 | + 2.0 | 1,801.4 | 1,757.5 | - 2.4 | 3,051.8 | 3,033.4 | - 0.6 |
| | 3 Q | 1,291.0 | | | 1,774.6 | | | 3,065.6 | | |
| | 4 Q | 1,290.8 | | | 1,813.3 | | | 3,104.1 | | |
| | Year | 5,026.3 | | | 7,086.6 | | | 12,112.9 | | |

SOURCE: Newsprint Division, American Paper Institute and Newsprint Section, Canadian Pulp & Paper Association

# NEWSPRINT HISTORICAL DATA

(THOUSANDS OF METRIC TONNES)



| YEAR | PRODUCTION | SHIPMENTS TO UNITED STATES | SHIPMENTS TO CANADA | SHIPMENTS TO OTHER MARKETS | SHIPMENTS TOTAL | INVENTORY END OF YEAR | IMPORTS FROM OVERSEAS |
|---|---|---|---|---|---|---|---|
| **UNITED STATES** | | | | | | | |
| 1977 | 3,512 | 3,390 | - | 117 | 3,507 | 31 | - |
| 1978 | 3,418 | 3,333 | - | 96 | 3,429 | 20 | 5 |
| 1979 | 3,685 | 3,602 | - | 87 | 3,689 | 16 | 132 |
| 1980 | 4,239 | 4,058 | - | 176 | 4,234 | 21 | 123 |
| 1981 | 4,752 | 4,452 | - | 283 | 4,735 | 38 | 36 |
| 1982 | 4,574 | 4,251 | - | 275 | 4,526 | 86 | 42 |
| 1983 | 4,687 | 4,409 | - | 265 | 4,674 | 99 | 67 |
| 1984 | 5,025 | 4,807 | - | 258 | 5,065 | 60 | 193 |
| 1985 | 4,924 | 4,648 | - | 279 | 4,927 | 57 | 333 |
| 1986 | 5,107 | 4,777 | - | 338 | 5,115 | 49 | 301 |
| 1987 | 5,300 | 5,026 | - | 284 | 5,310 | 36 | 356 |
| **CANADA** | | | | | | | |
| 1977 | 8,154 | 5,751 | 824 | 1,594 | 8,169 | 256 | - |
| 1978 | 8,842 | 6,443 | 924 | 1,546 | 8,913 | 184 | - |
| 1979 | 8,756 | 6,371 | 971 | 1,437 | 8,779 | 162 | - |
| 1980 | 8,625 | 6,118 | 980 | 1,524 | 8,622 | 165 | - |
| 1981 | 8,950 | 6,061 | 1,045 | 1,809 | 8,915 | 194 | - |
| 1982 | 8,109 | 5,595 | 934 | 1,525 | 8,054 | 256 | - |
| 1983 | 8,486 | 6,034 | 970 | 1,436 | 8,440 | 303 | - |
| 1984 | 9,013 | 6,585 | 1,070 | 1,363 | 9,018 | 298 | - |
| 1985 | 8,988 | 6,674 | 1,032 | 1,290 | 8,996 | 290 | - |
| 1986 | 9,289 | 6,735 | 1,121 | 1,446 | 9,302 | 277 | - |
| 1987 | 9,673 | 7,087 | 1,183 | 1,491 | 9,761 | 189 | - |
| **NORTH AMERICA** | | | | | | | |
| 1977 | 11,666 | 9,141 | 824 | 1,711 | 11,676 | 287 | - |
| 1978 | 12,260 | 9,776 | 924 | 1,642 | 12,342 | 204 | 5 |
| 1979 | 12,441 | 9,973 | 971 | 1,524 | 12,468 | 178 | 132 |
| 1980 | 12,864 | 10,176 | 980 | 1,700 | 12,856 | 186 | 123 |
| 1981 | 13,702 | 10,513 | 1,045 | 2,092 | 13,650 | 232 | 36 |
| 1982 | 12,683 | 9,846 | 934 | 1,800 | 12,580 | 342 | 42 |
| 1983 | 13,173 | 10,443 | 970 | 1,701 | 13,114 | 402 | 67 |
| 1984 | 14,038 | 11,392 | 1,070 | 1,621 | 14,083 | 358 | 193 |
| 1985 | 13,912 | 11,322 | 1,032 | 1,569 | 13,923 | 347 | 333 |
| 1986 | 14,396 | 11,512 | 1,121 | 1,784 | 14,417 | 326 | 301 |
| 1987 | 14,973 | 12,113 | 1,183 | 1,775 | 15,071 | 225 | 356 |

| YEAR | ANPA SURVEY OF NEWSPAPER PUBLISHERS STOCK END OF YEAR | U.S. ESTIMATED CONSUMPTION ANPA (525) STATISTICAL SAMPLE | DAILY NEWS-PAPERS | - ALL USERS - AS REPORTED | 48.8 G/M$^2$ | TONNAGE LOSS DUE TO NEWSPAPER STRIKES |
|---|---|---|---|---|---|---|
| 1977 | 722 | 6,143 | 7,210 | 9,279 | 9,280 | 5 |
| 1978 | 660 | 6,446 | 7,628 | 9,877 | 9,882 | 130 |
| 1979 | 628 | 6,673 | 7,878 | 10,199 | 10,205 | 3 |
| 1980 | 732 | 6,581 | 7,789 | 10,088 | 10,134 | - |
| 1981 | 961 | 6,506 | 7,813 | 10,164 | 10,219 | - |
| 1982 | 854 | 6,358 | 7,607 | 10,108 | 10,169 | 2 |
| 1983 | 790 | 6,638 | 7,898 | 10,589 | 10,666 | - |
| 1984 | 874 | 7,075 | 8,532 | 11,431 | 11,502 | - |
| 1985 | 910 | 7,199 | 8,725 | 11,587 | 11,651 | 21 |
| 1986 | 849 | 7,422 | 8,865 | 11,937 | 12,007 | - |
| 1987 | 900 | 7,606 | 9,303 | 12,322 | 12,395 | - |

## UNITED STATES NEWSPAPERS

| YEAR | ADVERTISING % OF TOTAL PAGES | CIRCULATIONS U.S. HOUSEHOLDS (000'S) | NEWSPAPER CIRCULATIONS (MILLIONS) DAILY | NEWSPAPER CIRCULATIONS (MILLIONS) SUNDAY | CIRCULATIONS PER HOUSEHOLD DAILY | CIRCULATIONS PER HOUSEHOLD SUNDAY |
|---|---|---|---|---|---|---|
| 1971 | 62.6 | 64,778 | 62.2 | 49.7 | 0.96 | 0.77 |
| 1972 | 64.4 | 66,676 | 62.5 | 50.0 | 0.94 | 0.75 |
| 1973 | 65.5 | 68,251 | 63.1 | 51.7 | 0.92 | 0.76 |
| 1974 | 65.6 | 69,859 | 61.9 | 51.7 | 0.89 | 0.74 |
| 1975 | 63.7 | 71,120 | 60.7 | 51.1 | 0.85 | 0.72 |
| 1976 | 63.5 | 72,867 | 61.0 | 51.6 | 0.84 | 0.71 |
| 1977 | 63.1 | 74,142 | 61.5 | 52.4 | 0.83 | 0.71 |
| 1978 | 63.4 | 76,030 | 62.0 | 54.0 | 0.82 | 0.71 |
| 1979 | 63.7 | 77,330 | 62.2 | 54.4 | 0.80 | 0.70 |
| 1980 | 62.6 | 80,776(1) | 62.2 | 54.7 | 0.77 | 0.68 |
| 1981 | 62.3 | 82,368 | 61.4 | 55.2 | 0.75 | 0.67 |
| 1982 | 62.2 | 83,527 | 62.5 | 56.3 | 0.75 | 0.67 |
| 1983 | 62.5 | 83,918 | 62.6 | 56.7 | 0.75 | 0.68 |
| 1984 | 63.0 | 85,407 | 63.1 | 57.5 | 0.74 | 0.67 |
| 1985 | 62.8 | 86,789 | 62.8 | 58.8 | 0.72 | 0.68 |
| 1986 | 62.2 | 88,458 | 62.5 | 58.9 | 0.71 | 0.67 |
| 1987 | N.A. | 89,479 | 62.8P | 60.1P | 0.70 | 0.67 |

P - Preliminary N.A. - Not Available

Source: Media Records, Department of Commerce and Editor and Publisher

(1) Figures were revised as of 1980 Census. Total revised series is not available at this time.

# FORECASTS OF U.S. ECONOMY

## GROSS NATIONAL PRODUCT

(BILLIONS OF CONSTANT (1982) DOLLARS - SEASONALLY ADJUSTED)

| SOURCE | 1988 | | | | 1989 | | | | ANNUAL* | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 1988 | 1989 |
| Merrill Lynch - June, 1988<br>% Chg. vs. Next Preceding Qtr. Annual Basis | 3,918.0<br>+3.9 | 3,947.4<br>+3.0 | 3,974.5<br>+2.8 | 3,999.7<br>+2.6 | 4,020.2<br>+2.1 | 4,014.8<br>-0.5 | 4,013.1<br>-0.2 | N.A. | 3,959.9<br>+3.6 | 4,023.5<br>+1.6 |
| The Conference Board - August, 1988<br>% Chg. vs. Next Preceding Qtr. Annual Basis | 3,956.1<br>+3.4 | 3,986.3<br>+3.1 | 4,020.5<br>+3.5 | 4,044.7<br>+2.4 | 4,060.3<br>+1.6 | 4,046.1<br>-1.4 | 4,029.1<br>-1.7 | 4,035.0<br>+0.6 | 4,001.9<br>+4.0 | 4,042.6<br>+1.0 |
| Data Resources Inc. - August, 1988<br>% Chg. vs. Next Preceding Qtr. Annual Basis | 3,956.1<br>+3.4 | 3,986.3<br>+3.1 | 4,016.9<br>+3.1 | 4,038.4<br>+2.2 | 4,075.0<br>+3.7 | 4,092.0<br>+1.7 | 4,105.1<br>+1.3 | 4,122.3<br>+1.7 | 3,999.4<br>+4.0 | 4,098.6<br>+2.5 |
| WEFA Group - August, 1988<br>% Chg. vs. Next Preceding Qtr. Annual Basis | 3,956.1<br>+3.4 | 3,986.3<br>+3.1 | 4,011.8<br>+2.6 | 4,034.8<br>+2.3 | 4,056.9<br>+2.2 | 4,070.7<br>+1.4 | 4,088.3<br>+1.7 | 4,105.4<br>+1.7 | 3,997.2<br>+3.9 | 4,080.3<br>+2.1 |

| | ACTUAL - 1987 | | | | ACTUAL - 1988 | | | |
|---|---|---|---|---|---|---|---|---|
| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. |
| Annual GNP for - 1986 - 3,721.7R<br>Annual GNP for - 1987 - 3,847.0R | 3,776.7R | 3,823.0R | 3,865.3R | 3,923.0R | 3,956.1R | 3,986.3 | | |

N.A. - Not Available
R - Revised

* - % Change from previous year

## ADVERTISING EXPENDITURES BY MEDIA - PERCENT OF TOTAL

| | PRINT | | | | | | OTHER | | |
|---|---|---|---|---|---|---|---|---|---|
| YEAR | NEWSPAPERS | MAGAZINES | BUSINESS PAPERS | DIRECT MAIL | OUTDOOR | TOTAL PRINT | TELEVISION | RADIO | OTHER* |
| 1980 | 27.6 | 5.9 | 3.1 | 14.2 | 1.1 | 51.9 | 21.4 | 6.9 | 19.8 |
| 1981 | 27.4 | 5.8 | 3.0 | 14.8 | 1.1 | 52.1 | 21.3 | 7.0 | 19.6 |
| 1982 | 26.6 | 5.6 | 2.8 | 15.5 | 1.1 | 51.6 | 22.1 | 7.0 | 19.3 |
| 1983 | 27.1 | 5.6 | 2.6 | 15.5 | 1.1 | 51.9 | 22.2 | 6.9 | 19.0 |
| 1984 | 26.8 | 5.6 | 2.6 | 15.7 | 1.0 | 51.7 | 22.9 | 6.6 | 18.8 |
| 1985 | 26.6 | 5.4 | 2.5 | 16.4 | 1.0 | 51.9 | 22.5 | 6.8 | 18.8 |
| 1986 | 26.4 | 5.2 | 2.3 | 16.8 | 1.0 | 51.7 | 22.4R | 6.8 | 19.1R |
| 1987 | 26.8R | 5.1R | 2.3 | 17.4R | 0.9 | 52.5R | 21.8R | 6.6 | 19.1R |

* - Including Farm Publications
R - Revised
Source: Robert J. Coen, McCann-Erickson, Inc.

(In Thousands of Metric Tonnes)

# OVERSEAS NEWSPRINT STATISTICS

(Not Seasonally Adjusted)

| | Norway | | | | Finland | | | | Sweden | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | TOTAL SHIPMENTS | | | | TOTAL SHIPMENTS | | | | TOTAL SHIPMENTS | | | |
| | 1987 | 1988 | % Change | Ship % of Cap 1988 | 1987 | 1988 | % Change | Ship % of Cap 1988 | 1987 | 1988 | % Change | Ship % of Cap 1988 |
| January | 69.7 | 58.0 | -16.8 | 72 | 92.2 | 99.8 | + 8.2 | 88R | 117.5 | 138.7 | +18.0 | 74R |
| February | 55.0 | 56.5 | + 2.7 | 77R | 109.1 | 99.6 | - 8.7 | 97R | 164.8 | 169.5 | + 2.9 | 99R |
| March | 69.8 | 77.6 | +11.2 | 96 | 111.0 | 114.1 | + 2.8 | 100R | 178.2 | 185.8 | + 4.3 | 98 |
| April | 73.5 | 62.5 | -15.0 | 80 | 110.9 | 103.5 | - 6.7 | 94R | 158.8 | 140.4 | -11.6 | 77 |
| May | 64.6 | 67.0 | + 3.7 | 83 | 115.2 | 94.3 | -18.1 | 83R | 157.7 | 174.8 | +10.8 | 86R |
| June | 63.1 | 76.7 | + 21.6 | 98 | 93.5 | 83.4 | - 10.8 | 76 | 163.1 | 165.1 | + 1.2 | 84 |
| July | 75.9 | | | | 116.8 | | | | 150.0 | | | |
| August | 56.0 | | | | 104.0 | | | | 186.3 | | | |
| September | 56.0 | | | | 122.8 | | | | 184.2 | | | |
| October | 87.4 | | | | 109.3 | | | | 164.3 | | | |
| November | 62.7 | | | | 108.9 | | | | 169.2 | | | |
| December | 61.2 | | | | 137.1 | | | | 185.4 | | | |
| 6 Months | 395.7 | 398.3 | + 0.7 | | 631.9 | 594.7 | - 5.9 | | 940.1 | 974.3 | + 3.6 | |
| TOTAL YEAR | 794.9 | | | | 1,330.8 | | | | 1,979.5 | | | |

R - Revised

| | SHIPMENTS TO THE UNITED STATES | | | | | |
|---|---|---|---|---|---|---|
| | Norway | | Finland | | Sweden | |
| | 1987 | 1988 | 1987 | 1988 | 1987 | 1988 |
| January | 4.7 | 0.0 | 2.1 | 0.6 | 9.6 | 14.5 |
| February | 3.0 | 6.5 | 3.4 | 0.7 | 23.4 | 17.9 |
| March | 1.2 | 4.2 | 1.0 | 0.4 | 31.1 | 15.1 |
| April | 4.8 | 2.2 | 1.3 | 0.7 | 13.8 | 14.5 |
| May | 3.0 | 4.2 | 3.7 | 0.1 | 19.0 | 16.6 |
| June | 7.1 | 8.5 | 1.4 | 0.2 | 11.5 | 19.0 |
| July | 8.6 | | 1.8 | | 17.6 | |
| August | 3.1 | | 0.7 | | 25.8 | |
| September | 3.8 | | 1.5 | | 22.6 | |
| October | 11.4 | | 2.8 | | 21.4 | |
| November | 5.9 | | 1.0 | | 11.9 | |
| December | 0.0 | | 1.0 | | 13.7 | |
| 6 Months | 23.8 | 25.6 | 12.9 | 2.7 | 108.4 | 94.6 |
| TOTAL YEAR | 56.6 | | 21.7 | | 221.4 | |

SOURCE: SCANNEWS

# OVERSEAS NEWSPRINT CAPACITY

| COUNTRY | ANNUAL CAPACITY (000 Metric Tonnes) 1987 | 1988 | 1989 | 1990 | 1991 | 1992 |
|---|---|---|---|---|---|---|
| **Europe** | | | | | | |
| Scandinavia | 1,444 | 1,367 | 1,427 | 1,467 | 1,532 | 1,535 |
| Finland | 934 | 953 | 957 | 926 | 956 | 975 |
| Norway | 2,134 | 2,345 | 2,539 | 2,561 | 2,424 | 2,562 |
| Sweden | 280 | 280 | 280 | 290 | 470 | 505 |
| Austria | 115 | 115 | 129 | 129 | 129 | 129 |
| Belgium-Luxem | 285 | 360 | 363 | 378 | 433 | 457 |
| France | 882 | 956 | 975 | 1,033 | 1,090 | 1,107 |
| Germany, Fed. Rep. | 245 | 245 | 249 | 259 | 259 | 270 |
| Italy | 245 | 330 | 375 | 390 | 390 | 390 |
| Netherlands | 140 | 165 | 211 | 228 | 228 | 228 |
| Spain | 260 | 260 | 270 | 275 | 275 | 275 |
| Switzerland | 532 | 545 | 550 | 800 | 860 | 860 |
| United Kingdom | | | | | | |
| Total Above Europe | 7,496 | 7,921 | 8,325 | 8,736 | 9,056 | 9,294 |
| **Africa** | | | | | | |
| South Africa | 440 | 440 | 440 | 440 | 440 | 440 |
| **Asia** | | | | | | |
| China | 510 | 540 | 590 | 590 | 590 | 590 |
| India | 330 | 330 | 330 | 330 | 330 | 330 |
| Indonesia | 180 | 180 | 180 | 180 | 230 | 230 |
| Japan | 2,865 | 3,090 | 3,254 | 3,298 | 3,331 | 3,364 |
| Korea, Rep. of | 380 | 380 | 390 | 555 | 555 | 555 |
| Total Above Asia | 4,265 | 4,520 | 4,744 | 4,953 | 5,036 | 5,069 |
| **Oceania** | | | | | | |
| Australia | 420 | 440 | 463 | 474 | 474 | 474 |
| New Zealand | 340 | 340 | 340 | 340 | 538 | 538 |
| Total Above Oceania | 760 | 780 | 803 | 814 | 1,012 | 1,012 |
| **South America** | | | | | | |
| Argentina | 230 | 230 | 255 | 255 | 255 | 255 |
| Brazil | 245 | 245 | 252 | 254 | 255 | 255 |
| Chile | 195 | 195 | 195 | 195 | 195 | 195 |
| Mexico | 430 | 430 | 430 | 430 | 490 | 530 |
| Venezuela | 0 | 0 | 0 | 0 | 0 | 150 |
| Total S.America | 1,100 | 1,100 | 1,132 | 1,134 | 1,195 | 1,385 |
| **TOTAL ABOVE COUNTRIES** | 14,061 | 14,761 | 15,444 | 16,077 | 16,739 | 17,300 |

Source: FAO, EPI, and CPPA

| ANNOUNCED CAPACITY CHANGES | | | | |
|---|---|---|---|---|
| Country | Company/Location | Date | Annual 000 Metric Tonnes | Comments |
| Argentina | Papel Tucuman/Lules | Late '88 | 22 | New Machine |
| Austria | Steyrermuehl Papierfabriks AG/ Steyrermuehl | Late '90 | 225 | New Machine |
| China | Jilin Paper/Jumen | 1988 | 60 | Machine Purchase |
| | Shi Xiang/Jumen | Early '88 | 40 | |
| | Yalvjiang/Dandong | Mid '89 | 40 | Machine Purchase |
| Finland | Enso-Gutzeit Oy/Summa | May '87 | (100) | Mach. shutdwn/swtchs |
| | Kajaani Oy/Kajaani | 1988 | 40 | Rebuild |
| | United Paper Mills/Kaipola | Late '89 | 200 | New machine |
| | Tampella/Abian Sala Mill | '89/'90 | (80) | |
| France | Remap/Grand Couronne | Fall '87 | 180 | New Machine - 70 net |
| | Norske Skogindustrieyas/Golbey | 1991 | 200 | New Mill |
| Germany, Fed.Rep. | Holtzmann | 1987 | 65 | |
| | Haindl/Schongau | 1990 | 200 | New Machine - 125 net |
| Italy | Burgo | 1987/90 | 64 | |
| Japan | Oji/Tomakomai | March '88 | 120 | No. 11 Machine |
| | Chuetsu/Futatsuka | Apr. '88 | 90 | (Net) - New Machine |
| | Marsumi/Ohe | April '88 | 180 | New Machine |
| | Marsumi/Kawanue | April '88 | (70) | Machine Shutdown |
| | Taio/Mishima | July '88 | 120 | New Machine |
| | Oji/Tomakomai | 1988 | 24 | |
| | Jujo/Ishinomaki | April '89 | 145 | New Machine |
| | Sanyo-Kokusaku-Yufutsu Mill/ Hokkaido Island | Nov. '89 | 120 | New Machine |
| Korea | Dai Han/Chung Won-Gun | 1987 | 100 | New Machine |
| Netherlands | Parenco/Renkum | Sept. '87 | 110 | Net-New Machine Replacing old mach. |
| Nigeria | Nigerian News/Oku Iboku | 1987 | 100 | New Mill |
| | Nigerian News/Oku Iboku | Nov. '87 | (40) | Machine Shutdown |
| Norway | A/S Follum/Honefoss | 1988 | 40 | Machine Modernization |
| | Norske Skogindustrier/Skogn | 1987-91 | 100 | Mach.Rebld./Modrnztn. |
| | A/S Follum/Honefoss | 1990 | 30 | Machine Modernization |
| | Union A/S / Skotfoss | June '88 | (40) | Machine Shutdown |
| Spain | Papelera Espanola/Renteria | 1987/89 | 50 | |
| Sweden | Stora Kopparbergs/Kvarnsveden | May '88 | 215 | New Machine |
| | Stora Kopparbergs/Kvarnsveden | May '88 | (60) | Closures-3 old mach. |
| | Hylte Bruks/South-west Sweden (Hylte) | March '89 | 210 | New Mill-Owned 75% by Stora and 25% by Feldmuhle |
| | SCA/Ortviken | Mid '90 | (100) | PM #1 to LWC |
| | | | 20 | PM #4 - Rebuild |
| | Holmen Bruk-Braviken Mill/ Norrkoping | '91 or '92 | 240 | New Machine |
| Switzerland | Papierfabrik Utzenstorf/ Utzenstorf | 1987 | 20 | |
| Taiwan | Taiwan Chung Hsing | 1988 | 40 | New Machine |
| U.Kingdom | North British Newsprint/ Gartcosh, Scotland | Late '89/90 | 140 | New Mill |
| | Shotton/North Wales | Late '89 | 200 | New Machine |
| Venezuela | Abitibi-Price Inc. and Bowater Inc./Ciudad Guayana | End '91 | 200 | New Mill |

# ANNUAL NEWSPRINT CAPACITY INFORMATION

(THOUSANDS OF METRIC TONNES)

| | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| United States (API) (1) | 5,129 | 5,238 | 5,308 | 5,300 | 5,315R | 5,460R | 5,525R | 5,603R | 6,090R | 6,313R | 6,357R | 6,357R |
| Canada (CPPA) (2) | 9,935 | 9,970 | 9,820 | 9,820 | 9,885 | 9,925 | 10,160 | 10,530 | 11,040 | 11,415 | 11,740 | 11,740 |
| Canada (Add't'l) (3) | - | - | - | - | - | - | - | - | 150 | 180 | 335 | 375 |
| Total | 15,064 | 15,208 | 15,128 | 15,120 | 15,200R | 15,385R | 15,685R | 16,133R | 17,280R | 17,908R | 18,432R | 18,472R |
| % Change | +4.3 | +1.0 | -0.5 | -0.1 | +0.5 | +1.2 | +1.9 | +2.9 | +7.1 | +3.6 | +2.9 | +0.2 |

(1) Based on data compiled in API Capacity Survey issued November, 1987 plus subsequent revisions announced since that time.
(2) Canadian Pulp and Paper Association - Newsprint Data Book - 1987, plus subsequent revisions announced since that time.

## ANNOUNCED CAPACITY CHANGES

### UNITED STATES MILLS

| COMPANY | LOCATION | DATE | COMMENTS | NEWSPRINT | OTHER | TOTAL |
|---|---|---|---|---|---|---|
| Great Northern | East Millinocket, ME | 1986-1988 | Mill improvements - gain in Newsprint Loss in Uncoated Groundwood | 27,000 | (-16,000) | 11,000 |
| Newsprint South | Grenada, MS | 4th Qtr. '89 | New Mill | 205,000 | - | 205,000 |
| Ponderay | USK, WA | Late '89 | New Mill | 155,000 | - | 155,000 |
| Southeast | Dublin, GA | Early '90 | New Machine | 195,000 | - | 195,000 |
| Abitibi-Price/Parsons & Whittemore (4) | Claiborne, AL | End '90 | New Mill | 220,000 | - | 220,000 |

### CANADIAN MILLS

| | | | | | | |
|---|---|---|---|---|---|---|
| Consolidated-Bathurst | Ville de la Baie, QUE | 1987 | Improvements | 72,000 | - | 72,000 |
| Stora | Port Hawkesbury, N.S. | 1987 | Improvements | 20,000 | - | 20,000 |
| CIP Inc. | Gatineau, QUE | Feb. '87 | New Machine - 147,000 - replacing an old machine - Net gain of 85,000 | 85,000 | - | 85,000 |
| Abitibi-Price | Alma, QUE | Early '87 | Mill conversion to Uncoated Groundwood - loss of newsprint at this mill will be absorbed by other mills | (-59,000) | 41,000 | (-18,000) |
| Abitibi-Price | Kenogami, QUE | '87-'90 | Conversion and/or retirement of two paper machines | (-75,000) | - | (-75,000) |
| MacMillan Bloedel | Powell River, BC | Late '87 | Decrease in newsprint - increase in Groundwood Specialties | (-50,000) | 86,000 | 36,000 |
| Donohue | Clermont, QUE | Nov. '87 | New Machine (#5) 180,000 - replacing an old machine (#3)- Net gain of 140,000 | 140,000 | - | 140,000 |
| Gaspesia | Chandler, QUE | 1987 - 1990 | Modernization of mill | 22,000 | - | 22,000 |
| Kruger | Corner Brook, NFLD | 1987 - 1991 | Machine Improvements | 60,000 | - | 60,000 |
| Quebec & Ontario | Baie Comeau, QUE | 1987 - 1988 | Machines (#1-#2 & #4) improvements | 17,000 | - | 17,000 |
| Quebec & Ontario | Thorold, ONT | 1987 - 1991 | Improvements | 15,000 | - | 15,000 |
| BCFP | Crofton, B.C. | 1988 | Improvements | 35,000 | - | 35,000 |
| MacMillan Bloedel | Powell River, B.C. | Jan. '88 | Upgrade (#8) machine idle since 1985 | 65,000 | - | 65,000 |
| F.F. Soucy | Riviera-Du-Loupe | Late '88 | ReBuild-#2 machine | 20,000 | - | 20,000 |
| James Maclaren | Masson, QUE | 1988 - 1990 | #3 machine improvements | 30,000 | - | 30,000 |
| Abitibi-Price | Alma, QUE | 1989 | Convert machine from Newsprint to Other Grades | (-60,000) | 60,000 | - |
| Finlay Forest Ind. | Mackenzie, B.C. | Spring '89 | New Machine | 215,000 | - | 215,000 |
| Crown Forest | Elk Falls, BC | By 1989 | Expansion | 50,000 | - | 50,000 |
| Atlantic Packaging | Whitby, Ont | Mid '90 | New Mill | 150,000 | - | 150,000 |
| Gold River Newsprint | Gold River, BC | Oct. '89 | New Mill | 230,000 | - | 230,000 |
| Bowater Mersey | Brooklyn, N.S. | Late '89 | Improvements | 50,000 | - | 50,000 |
| Kruger (3) | Three Rivers, QUE | Early '90 | New Machine | 180,000 | - | 180,000 |
| Alberta Newsprint | Whitecourt, ALB. | Sept. '90 | New Mill | 220,000 | - | 220,000 |
| Consolidated-Bathurst | Grandmere, QUE | 1990 | New Machine-182,000 - replacing 2 old machines - Net gain of 110,000 | 110,000 | - | 110,000 |
| Canadian Pacific | Thunder Bay, ONT | Early 1991 | New machine - 240,000 - replacing 2 older machines of 180,000 - Net gain of 60,000 | 60,000 | - | 60,000 |
| Howe Sound (3) | Port Mellon, B.C. | 1992 | New Mill | 195,000 | - | 195,000 |

(3) Additional Canadian Capacity. (4) Not included in API Capacity issued 11/87.